

TAM Onboarding

Listing down the plan & a step-by-step guide below, for a TAM to get equipped with the basic skills for helping the customers integrate and onboard with CleverTap, in 45 days.

TOPIC	ESTIMATED TIME TO COMPLETION
CleverTap Dashboard : Basic Feature Demos	3 days
Native Android Integration	2 days
Native iOS Integration	2 days
Native Web Integration	1 days
Customer Onboarding process	2 days
JIRA: The Customer Ticket Management Platform	1 day
Answering customer tickets on JIRA (non-onboarding)	30 days
TOTAL	45 days

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CleverTap Dashboard : Basic Feature Demos

Estimated time to completion : 3 days

Training Recording links:

Platform training 1 :

https://clevertap.zoom.us/rec/share/a-MQ7aauljNfyZ-BE4kAJt_BYqRJZZKPmPye7YhSF3V9mOxijSoiHf-KPHFyr6z8.S6fV52J565Ou6Xux Passcode: bH!!2XQI

Platform training 2 :

https://clevertap.zoom.us/rec/share/TJsNPljzpJjiQxP_h_BC7NM2BcL3YTRjmSkQAvyhZaX88N5pXrQKpS3p1gStG_Nw.ozBsS9aZitmMVBn8 Passcode: A=%Z#c8Q

Platform training 3 :

https://clevertap.zoom.us/rec/share/eTRbX2wDVYMBu_MZHdAC7OI7SLn4-R6QatFhSzQbnBERXuNpfFhnbesGISgycmpD.L796_Q7tBVSIQq14 Passcode: e2v45@k@

Platform training 4 :

<https://clevertap.zoom.us/rec/share/MxkSJ780dpf7yUFgwF4J77hknW7EoXTFRRs7QKwEW48EnUtrVwrAf3iiNMhVwD.7H2wR5GStj0FEhXS> Passcode: k&EH7NnS

CleverTap SDKs :

https://clevertap.zoom.us/rec/share/YhCD8CSBct65d1IY1PJ0SyT6hL_V6NFxngN2KHKZFxbC4TIFBnVwD8uosKmi_dKJ.HDc5g2OmirVcfDrp Passcode: k.+92?@1

CleverTap APIs and Webhooks :

https://clevertap.zoom.us/rec/share/8qmSGtb_5Ck8ZntjkYttEhTcjWkDrWZgTvmz_2B86OHvpoR90S8uONUv0WaA5RIb.0IDRxbTp4ed-eByr Passcode: Xeq!d&j6

Native Android Integration

Estimated time to completion : 3 days

Prerequisites:

- 1) Android Studio installed
- 2) JDK installed
- 3) Basic Android app created
- 4) Testing account available. You can use the existing “cssupport” account on CleverTap for testing

Task -

Integrate CleverTap’s Native Android SDK and implement the SDK methods to push events and user properties at relevant user action triggers.

Documentation links for implementation reference:

<https://developer.clevertap.com/docs/android-quickstart-guide>

<https://developer.clevertap.com/docs/concepts-user-profiles#section-maintaining-multiple-user-profiles-on-the-same-device>

<https://developer.clevertap.com/docs/concepts-events#section-custom-events>

Acceptance criteria -

Have integrated the CleverTap Android SDK in my Android application, able to push events and user properties and see them on the corresponding user profile on the CleverTap dashboard.

Task -

Implementing engagement modules like FCM Push notifications & in-app notifications in the Android app.

Documentation links for implementation reference:

Push notifications:

<https://developer.clevertap.com/docs/find-your-fcm-sender-id-fcm-server-api-key> (create an FCM project on *console.firebase.google.com* and then refer to this link)

<https://developer.clevertap.com/docs/android#section-push-notifications>

<https://developer.clevertap.com/docs/android#section-custom-android-push-notifications-handling>

<https://developer.clevertap.com/docs/android#section-push-notifications-for-android-os>

<https://developer.clevertap.com/docs/android#section-advanced-android-push-notification-options>

In-app notifications:

<https://developer.clevertap.com/docs/android#section-in-app-notifications>

Acceptance criteria -

Have integrated the push notifications & in-app notifications in my Android application, able to send test push notifications & in-app notifications from the CleverTap dashboard and successfully see them rendering on the device

Native iOS Integration

Estimated time to completion : 3 days

Prerequisites

- 1) Xcode Installed
- 2) Cocoapods installed
- 3) Basic iOS app created
- 4) Testing account available. You can use the existing “cssupport” account on CleverTap for testing

Task -

Integrate CleverTap’s Native iOS SDK and implement the SDK methods to push events and user properties at relevant user action triggers.

Documentation links for implementation reference:

<https://developer.clevertap.com/docs/ios-quickstart-guide>

<https://developer.clevertap.com/docs/concepts-user-profiles#section-maintaining-multiple-user-profiles-on-the-same-device>

<https://developer.clevertap.com/docs/concepts-events#section-custom-events>

Acceptance criteria -

Have integrated the CleverTap iOS SDK in my Android application, able to push events and user properties and see them on the corresponding user profile on the CleverTap dashboard.

Task -

Implementing engagement modules like APNS Push notifications & in-app notifications in the Android app.

Documentation links for implementation reference:

Push notifications:

<https://developer.clevertap.com/docs/ios#section-push-notifications>
<https://developer.clevertap.com/docs/how-to-create-an-ios-apns-certificate>
<https://developer.clevertap.com/docs/how-to-create-an-ios-apns-auth-key>
<https://developer.clevertap.com/docs/ios#section-advanced-ios-push-notifications>

In-app notifications:

In-app notifications in iOS do not require any additional code as the CleverTap SDK itself has all of the code inbuilt to support in-app notifications.

Acceptance criteria -

Have integrated the push notifications & in-app notifications in my Android application, able to send test push notifications & in-app notifications from the CleverTap dashboard and successfully see them rendering on the device

Native Web Integration

Estimated time to completion : 3 days

Prerequisites

- 1) Python installed to access localhost
- 2) Basic Website created

Task -

Integrate CleverTap's Native Web SDK and implement the SDK methods to push events and user properties at relevant user action triggers.

Documentation links for implementation reference:

<https://developer.clevertap.com/docs/web-quickstart-guide>

<https://developer.clevertap.com/docs/concepts-user-profiles#section-maintaining-multiple-user-profiles-on-the-same-device>

<https://developer.clevertap.com/docs/concepts-events#section-custom-events>

Acceptance criteria -

Have integrated the CleverTap Web SDK on the website, able to push events and user properties and see them on the corresponding user profile on the CleverTap dashboard.

Task -

Implementing engagement modules like Web Push notifications & Web pop up notifications on the website

Push notifications:

Documentation links for implementation reference:

<https://developer.clevertap.com/docs/web#section-web-push>

Pop-up notifications:

Pop up notifications on the web do not require any additional code as the CleverTap SDK itself has all of the code inbuilt to support pop-up notifications.

Acceptance criteria -

Have integrated the push notifications & pop-up notifications on the website, able to send test push notifications & pop-up notifications from the CleverTap dashboard and successfully see them rendering on the machine/device.

Other Platform Integrations

Estimated time to completion : Can vary

Once done with the above native integrations, you can move ahead with integrating auxiliary SDKs like React Native(App), Segment(App), Flutter(App), Cordova(App), Ionic(App), Unity(App), Shopify(Web) in the same order.

Documentation links for implementation reference:

<https://developer.clevertap.com/docs/mobile-platforms>

<https://wizrocket.atlassian.net/wiki/spaces/TAMKB/pages/1745682435/Integrating+Web+Push+i+n+Shopify+websites#Is-this-all-that-is-needed-to-be-done%3F>

Customer Onboarding Process Overview

Estimated time to completion : 2 days

Recording Link:

<https://clevertap.zoom.us/rec/share/AqDz--2Ufn7Xi78KHgQvNGrwX8LxSbITRWP2Q0LeoSk1mbNveJj7CNIRnDkk9EmK.m6q4mg7lhkj9ldwW> Passcode: vx!F8Lgr

JIRA: The customer ticket management platform

Estimated time to completion : 1 day

Recording Link:

https://clevertap.zoom.us/rec/share/jKVmtpr1K7Fukh4c1XtNVq484i5XJioWarmIh2dbjY04HJ1H9d2xZBZ2ZoeS2o0B.Xf_eM_VTzxVLzsvA

Passcode: 57+5x7na

Presentation Link:

<https://drive.google.com/file/d/13xz1nKGIAHtvRD6ZGjOsqTpMy5WdJUdm/view?usp=sharing>